



Number: 8.0.1.73000.0  
New  Revision

Date: 7-1-04

Topic: Individual Training Accounts (ITA)

Affected Programs: Adult, Dislocated Worker, NEG, RRAA

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**Purpose**

To provide Contractors guidance in establishing policy and procedures around issues Individual Training Accounts for WIA participants.

**Related Policy**

Individual Training Accounts #8,0.0.73000.0

**Program Guidelines**

- ◆ ITAs are available for individuals eligible for WIA Adult and Dislocated worker services who are:
  - Unable to secure work because they have little or no work history or face other significant barriers to employment and would significantly benefit from training (increased wages, promotion, credential, etc.)
  - Working but unable to achieve family self-sufficiency or advance in their careers without additional training.

A customer may be offered an ITA after they have engaged in core and intensive services, and are assessed to need the specific training services made available by the ITA. This need NOT be a specific period of time, training services should be made available when it makes sense in the context of the overall service strategy.

- ◆ A written Individual Training Plan & Budget must be developed, which includes the following components: The need for the training as identified through Intensive services; clear employment goals set as a part of the proposed training; timelines attached to the set goals (and specifically, timeline for spending ITA funds); a budget that has accurate and clear costs and funding sources for the planned training activities and related costs that support successful completion of training (childcare, transportation, etc).
- ◆ Participants (with the assistance of career specialists) must investigate and document of other resources that may be available to fund the desired training program.
- ◆ Financial aid must be applied for prior to WIA funds being committed.
- ◆ The participants file should include the following documentation:
  - Occupational Goal Research
  - Labor Market Review

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- Personal Budget/Financial Review
  - Child Care and Transportation Analysis
  - Skill/Aptitude/Interest Assessments
  - Training Provider Evaluation
  - Informational Interviews (optional)
- ◆ The participant file must include acknowledgement of the following responsibilities relative to an ITA (these may be included in the Individual Training Plan & Budget)
- Participation in the development of the Individual Training Plan & Budget.
  - Regular attendance and participation in planned training.
  - Maintaining passing grades/satisfactory performance.
  - Maintaining regular contact with WIA/One Stop Program.
  - Notifying WIA/One Stop Program of part-time or full time employment.
- ◆ Develop written ITA spending cap and allocation guidelines. WSI requires that each One Stop set policy around ITA spending caps and allocations that take into consideration the needs identified in the individual employment and training plans and budgets. WSI also suggests that guidelines be flexible enough to provide for exceptions to the limitations (caps) in individual cases as needed. Organizations may choose to develop an approval process for the amount a career consultant has allocated for each ITA customer as part of these guidelines.
- ◆ Each One Stop must make a copy of the full Statewide ETP List (not just programs in your area) available, as a core service to the general public, to WIA participants and to participants whose training is supported by other One-Stop partners. We suggest you have paper copies available in your resource areas and have the ETPL web site link on all Resource Room computers. Also, the Federal Application for Student Aid must be readily available.
- ◆ Each customer receiving training must have received and signed the One-Stop's grievance policy. The customer must have received a copy of the grievance policy to keep and a signed copy must be in the customer's One Stop file.